



Generating an HCM Report

The purpose of this Job Aid is to walk through the process used to generate an HCM Report.

For the purpose of the instructions contained in this Job Aid, the steps used to generate the Summary of Productive Hours report are provided. Generally, these instructions can be used to generate any of the Cardinal HCM Reports. However, the initial navigation path, the parameters available, and the report formats available will differ based on the specific report being generated.

Utilize these instructions along with the report specific data provided in the HCM Reports Catalog to generate the applicable report. The HCM Reports Catalog can be located on the Cardinal Website under **Resources**.

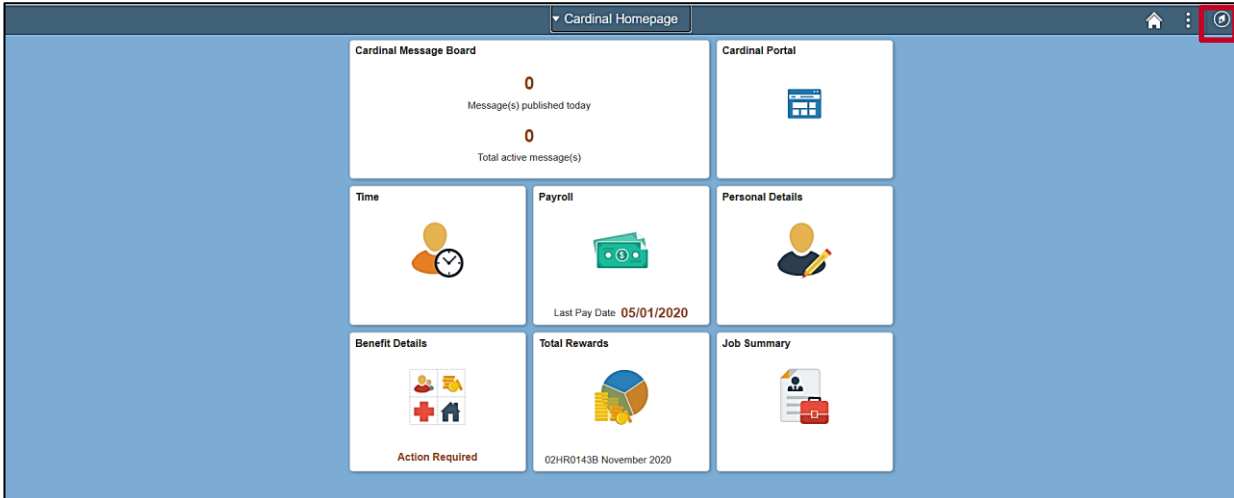
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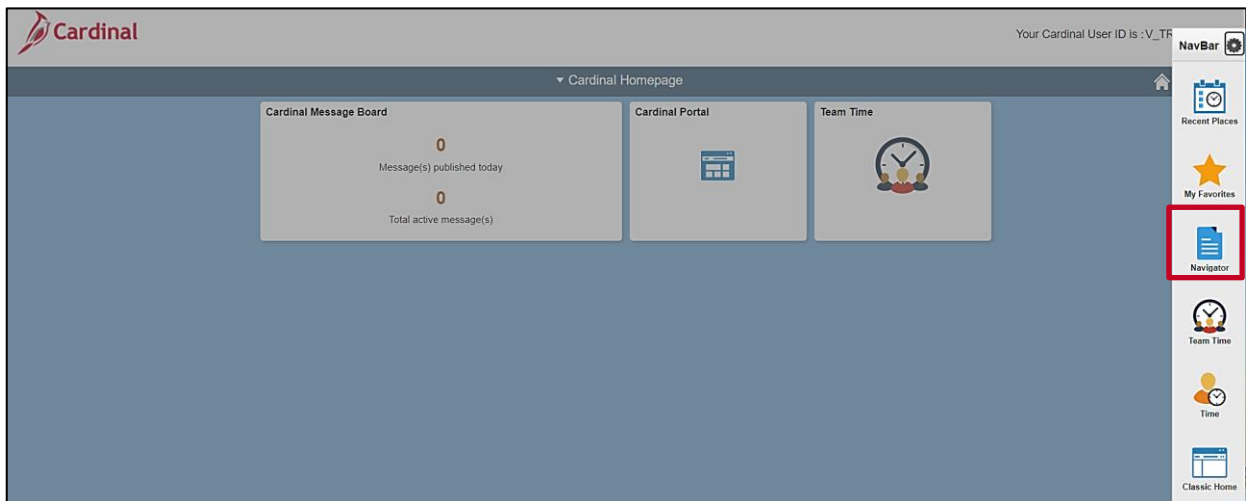
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



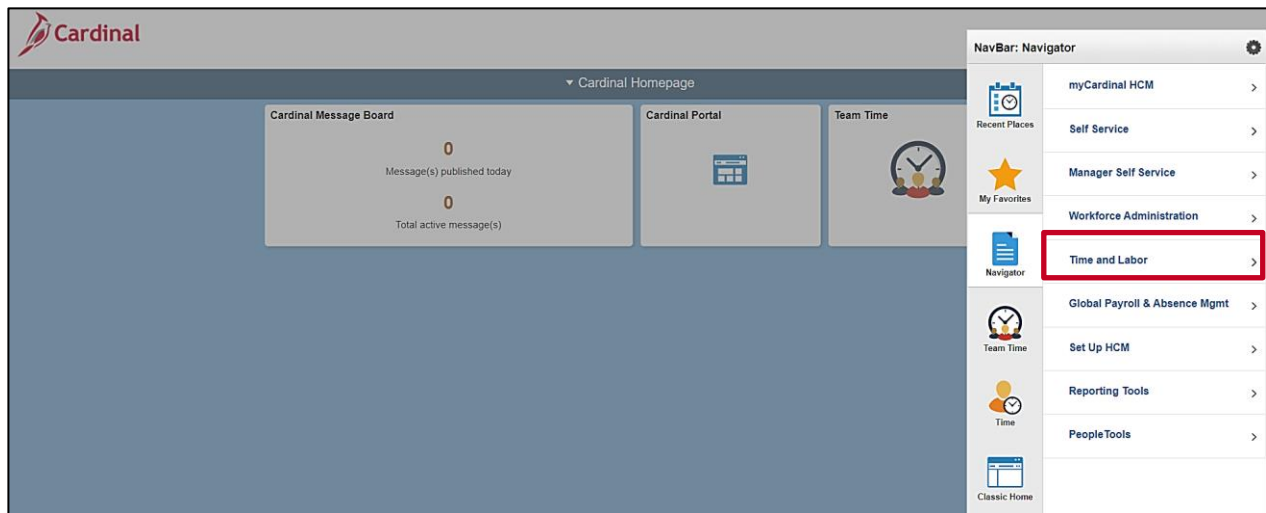
2. Click the **NavBar** icon in the top right corner of the page.

The **NavBar** panel displays along the right side of the page.



3. Click the **Navigator** icon.

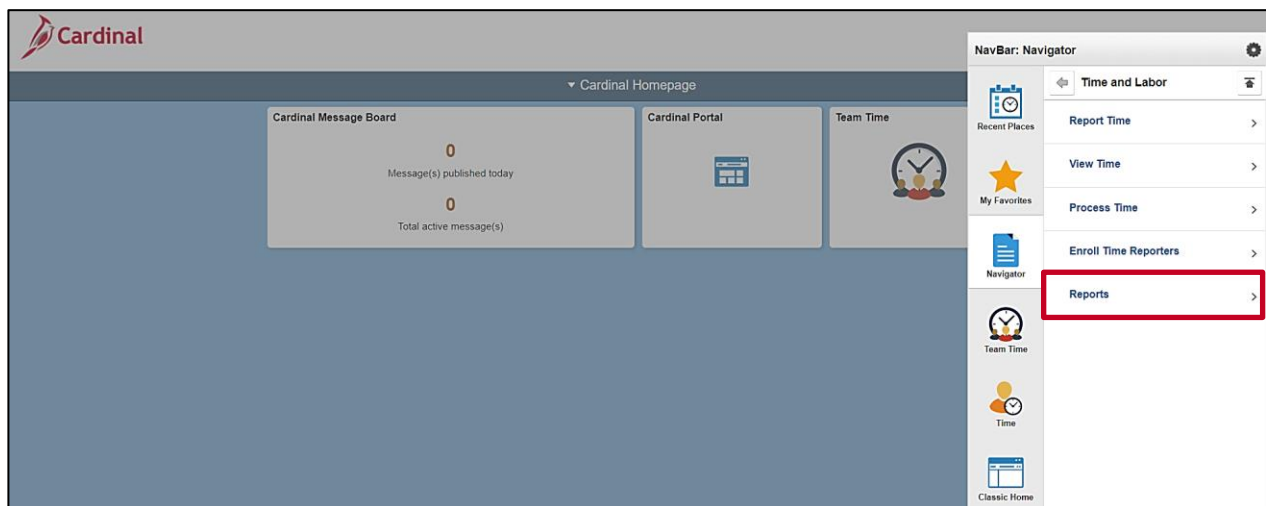
The **Navigator** displays.



4. Click the **Time and Labor** list item.

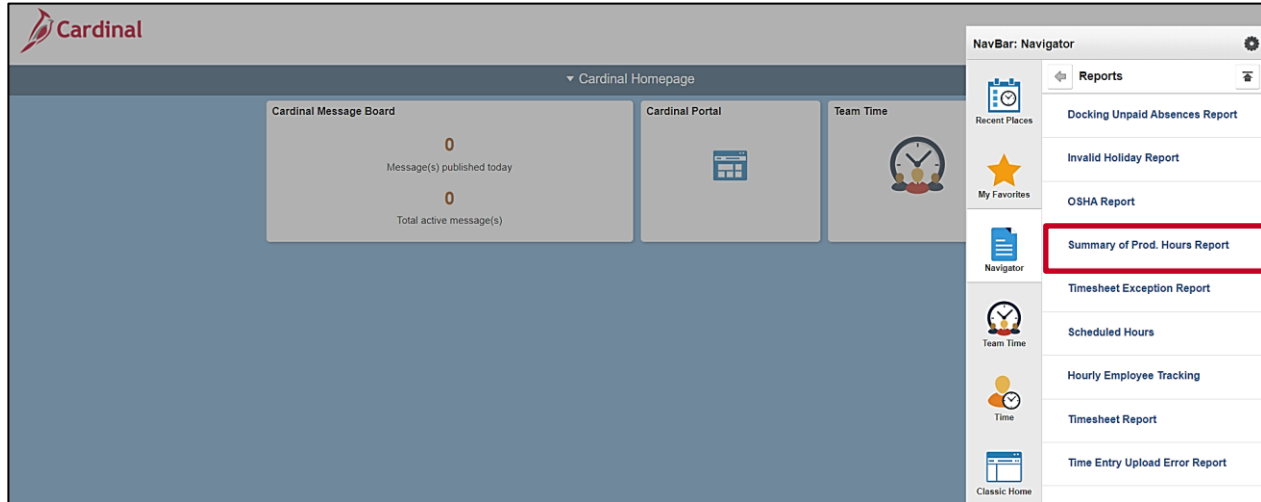
Note: The initial navigation path provided in Steps 4 – 6 is used specifically to generate the Summary of Productive Hours report. Remember to refer to the HCM Reports Catalog and use the initial navigation path provided for the report being generated. The HCM Reports Catalog is located on the Cardinal Website under **Resources**.

The **Time and Labor** menu displays.



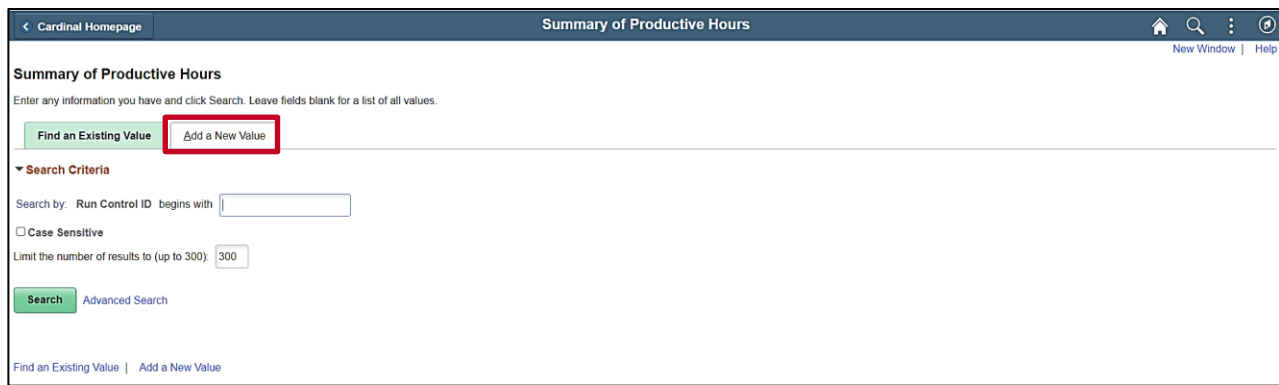
5. Click the **Reports** list item.

The **Reports** menu displays.



6. Click the **Summary of Prod. Hours Report** list item.

The **Summary of Productive Hours** page displays with the **Find an Existing Value** tab displayed by default.



Note: If this is not the first time generating this report, always search for and use an existing Run Control ID before creating a new one. Users cannot delete Run Control IDs once they are created and saved. The instructions provided in Steps 7 - 9 assume that this is the first time that this report is being generated.

7. Click the **Add a New Value** tab.



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The **Add a New Value** tab displays.

Cardinal Homepage Summary of Productive Hours

Find an Existing Value Add a New Value

Run Control ID

Add

Find an Existing Value Add a New Value

8. Enter a Run Control ID in the **Run Control ID** field based on the following guidelines:
- The Run Control ID must be unique and should be descriptive enough to help locate for future use
 - Up to 30 characters are allowed
 - No blank spaces can be used. However, and underscore can be used in lieu of spaces
 - Do not use wildcard symbols (%)

Cardinal Homepage Summary of Productive Hours

Find an Existing Value Add a New Value

Run Control ID V_TRN_Summ_Prod_Hours

Add

Find an Existing Value Add a New Value

9. Click the **Add** button.

The **Summary of Productive Hours** tab displays.

Cardinal Homepage Summary of Prod. Hours Report

Summary of Productive Hours

Run Control ID V_TRN_Summ_Prod_Hours Report Manager Process Monitor Run

*Business Unit Department Empl ID *From Date *Thru Date *Employee Type

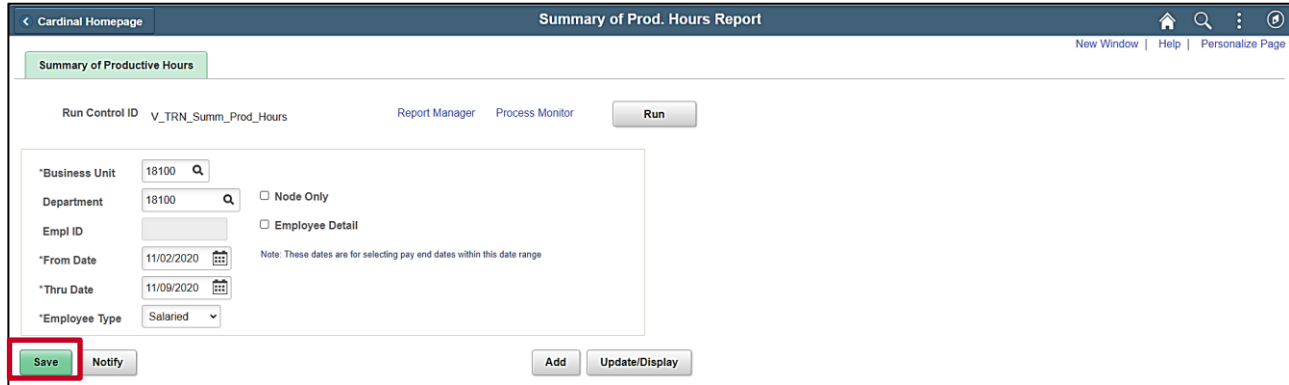
Note: These dates are for selecting pay end dates within this date range

Save Notify Add Update/Display

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10. Enter the desired parameters for the report within the corresponding fields.

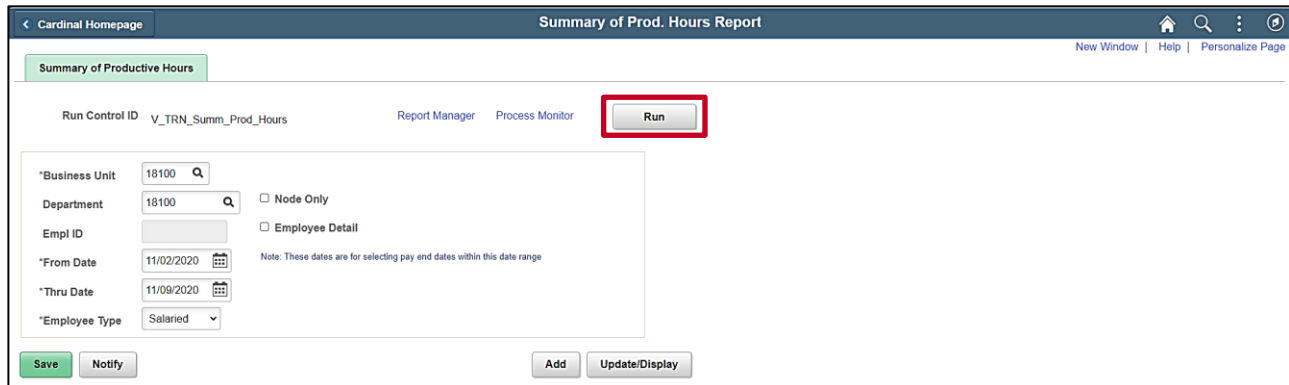
Note: Parameters are used to limit/define the specific data requirements for the report. The parameter fields available will differ based on the HCM report being generated. Refer to the HCM Reports Catalog for a listing of the parameters available for the specific report being generated. The HCM Reports Catalog is located on the Cardinal Website under **Resources**.



The screenshot shows the 'Summary of Prod. Hours Report' interface. At the top, there's a header with 'Cardinal Homepage' and 'Summary of Prod. Hours Report'. Below the header, there's a 'Run Control ID' field with the value 'V_TRN_Summ_Prod_Hours'. To the right of this field are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below these, there's a form with several input fields: '*Business Unit' (18100), 'Department' (18100), 'Empl ID' (empty), '*From Date' (11/02/2020), '*Thru Date' (11/09/2020), and '*Employee Type' (Salaried). There are also checkboxes for 'Node Only' and 'Employee Detail'. A note states: 'Note: These dates are for selecting pay end dates within this date range'. At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. The 'Save' button is highlighted with a red box.

11. Click the **Save** button.

The page refreshes.



The screenshot shows the same 'Summary of Prod. Hours Report' interface as before, but the 'Run' button is now enabled and highlighted with a red box. The 'Save' button is still highlighted with a red box. The other fields and buttons remain the same.

12. Once saved, the **Run** button is enabled. Click the **Run** button.



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The **Process Scheduler Request** page displays in a pop-up window.

| Select | Description | Process Name | Process Type | Type | Format | Distribution |
|-------------------------------------|-----------------------------|--------------|--------------|------|--------|--------------|
| <input checked="" type="checkbox"/> | Summary of Productive Hours | VTAR0030 | SQR Report | Web | CSV | Distribution |

13. The **Type** field defaults to “Web”. Update to “Email”, “File”, or “Printer” as desired. If “Email” is selected, use the **Distribution** link to identify the email address to send the report to.

14. The **Format** field defaults based on the report being generated. Update as needed if other formats are available for the report being generated.

Note: Refer to the HCM Reports Catalog to identify the formats available for each specific HCM Report. The HCM Reports Catalog is located on the Cardinal Website under **Resources**.

15. Click the **OK** button.

The **Summary of Productive Hours** tab returns.

Run Control ID: V_TRN_Summ_Prod_Hours

Report Manager: Process Monitor **Run**

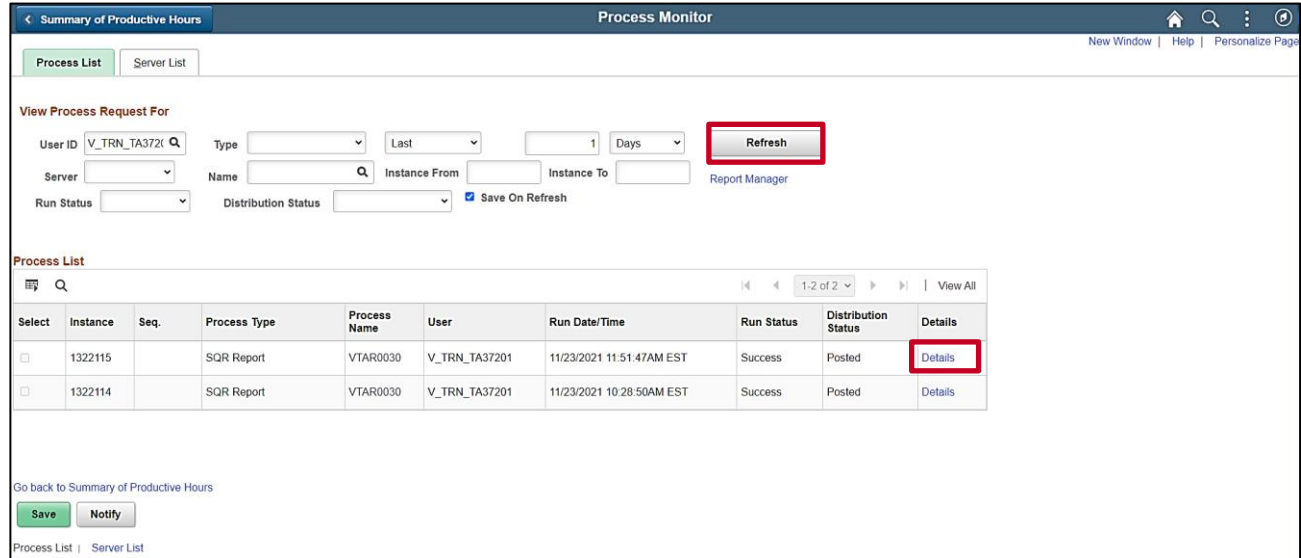
Process Instance: 1322115

*Business Unit: 18100
Department: 18100
Empl ID:
*From Date: 11/02/2020
*Thru Date: 11/09/2020
*Employee Type: Salaried

Note: Notice that a Process Instance Number has been assigned to the report request (1322115 in this example). Take note of this Process Instance Number for future use.

16. Click the **Process Monitor** link.

The **Process Monitor** page displays.



Process Monitor

Summary of Productive Hours | New Window | Help | Personalize Page

Process List | Server List

View Process Request For

User ID: V_TRN_TA37201 | Type: | Last: | 1 Days | **Refresh**

Server: | Name: | Instance From: | Instance To: | Report Manager

Run Status: | Distribution Status: | ☒ Save On Refresh

Process List

| Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details |
|--------------------------|----------|------|--------------|--------------|---------------|---------------------------|------------|---------------------|----------------|
| <input type="checkbox"/> | 1322115 | | SQR Report | VTAR0030 | V_TRN_TA37201 | 11/23/2021 11:51:47AM EST | Success | Posted | Details |
| <input type="checkbox"/> | 1322114 | | SQR Report | VTAR0030 | V_TRN_TA37201 | 11/23/2021 10:28:50AM EST | Success | Posted | Details |

Go back to Summary of Productive Hours

Save | Notify

Process List | Server List

17. Locate the applicable report within the **Process List** section using the Process Instance Number previously captured. The report can be viewed once the **Run Status** field updates to either "Success" or "Error" and the **Distribution Status** field updates to "Posted". Periodically click the **Refresh** button until these two status fields update.

18. Click the corresponding **Details** link.



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The **Process Detail** page displays in a pop-up window.

Process Detail [X] [Help]

Process

| | | | |
|------------|----------|---------------------|-----------------------------|
| Instance | 1322115 | Type | SQR Report |
| Name | VTAR0030 | Description | Summary of Productive Hours |
| Run Status | Success | Distribution Status | Posted |

Run

| | |
|----------------|-----------------------|
| Run Control ID | V_TRN_Summ_Prod_Hours |
| Location | Server |
| Server | PSUNX1 |
| Recurrence | |

Update Process

☐ Hold Request
☐ Queue Request
☐ Cancel Request
☒ Delete Request
☐ Re-send Content
☐ Restart Request

Date/Time

| | |
|--------------------|---------------------------|
| Request Created On | 11/23/2021 12:02:23PM EST |
| Run Anytime After | 11/23/2021 11:51:47AM EST |
| Began Process At | 11/23/2021 12:02:39PM EST |
| Ended Process At | 11/23/2021 12:02:51PM EST |

Actions

[Parameters](#) [Transfer](#)
[Message Log](#)
[Batch Timings](#)
[View Log/Trace](#)

OK **Cancel**

19. If the report completed with a Run Status of “Success”, click the **View Log/Trace** link.

Note: If the report completed with a Run Status of “Error”, the **Message Log** link can be used to review why the error occurred.



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The **View Log/Trace** page displays in a pop-up window.

View Log/Trace

×

Help

Report

Report ID

761480

Process Instance

1322115

Message Log

Name

VTAR0030

Process Type

SQR Report

Run Status

Success

Summary of Productive Hours

Distribution Details

Distribution Node

hrpytrn

Expiration Date

12/23/2021

File List

| Name | File Size (bytes) | Datetime Created |
|--|-------------------|----------------------------------|
| SQR_VTAR0030_1322115.log | 2,299 | 11/23/2021 12:02:51.649212PM EST |
| vtar0030_1322115.csv | 527 | 11/23/2021 12:02:51.649212PM EST |
| vtar0030_1322115.out | 0 | 11/23/2021 12:02:51.649212PM EST |

Distribute To

| Distribution ID Type | *Distribution ID |
|----------------------|------------------|
| User | V_TRN_TA37201 |

Return

20. Click the corresponding link within the **File List** section to view the generated report in the desired format.